

REGISTRATION OF PROVIDER ORGANIZATIONS

ONLINE SUBMISSION PLATFORM USER MANUAL

AUGUST 31, 2015

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Introduction

The Health Policy Commission (HPC), in collaboration with the Center for Health Information and Analysis (CHIA), has created an online submission platform for Provider Organizations to submit their Registration of Provider Organization (RPO) materials. The platform will streamline reporting for Part 2 of Initial Registration, and will make the registration renewal process more efficient by allowing Provider Organizations to access their previously submitted materials and make necessary updates to existing files.

This User Manual contains instructions on accessing the system, completing the required files for Part 2 of Initial Registration, and submitting final materials to the HPC for review. The HPC is continually working with CHIA to make enhancements to the online submission platform and will update this User Manual to reflect any updates. For additional details regarding the information Provider Organizations are required to submit, please review the [Data Submission Manual](#) (DSM) and [Frequently Asked Questions](#) available on the HPC's website.

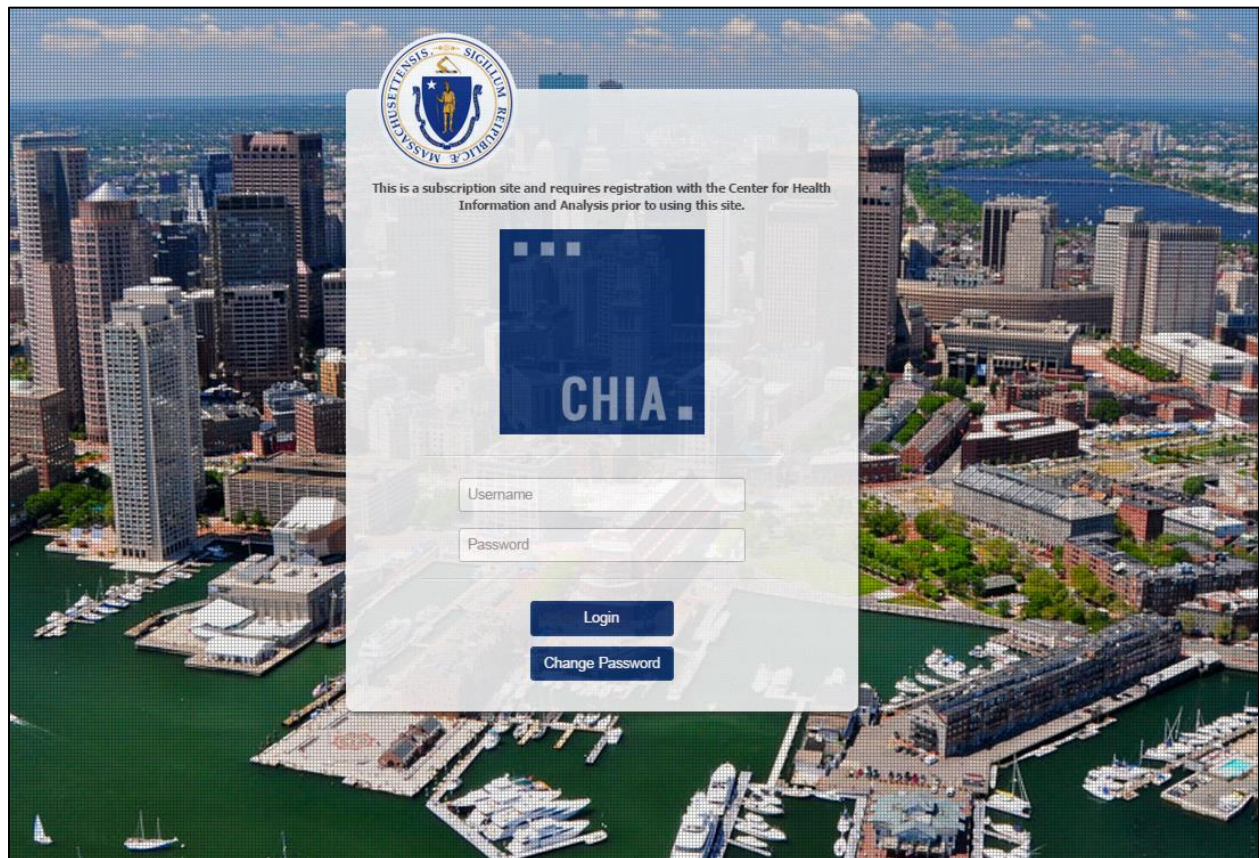
If you have questions about how to use the online submission platform, please contact program staff for assistance at HPC-RPO@state.ma.us.

Accessing the Online Submission Platform

To access the online submission platform, you must complete an INET User Agreement form, available on the HPC's [website](#). Most users submitted this form to the HPC in May or June 2015. If you have not completed an INET User Agreement form and want to access the online submission platform, please send a completed form to HPC-RPO@state.ma.us. If multiple individuals from a single Provider Organization wish to use the online submission platform, each individual should submit a separate INET User Agreement form.

You will receive an e-mail notification when your account has been activated. If you did not previously have an account with CHIA for reporting purposes, the e-mail notification will include the online submission platform URL, your user name, and a temporary password. If you already had an account with CHIA, the e-mail notification will include the online submission platform URL and your user name. You will use your existing password to log-in to the site.

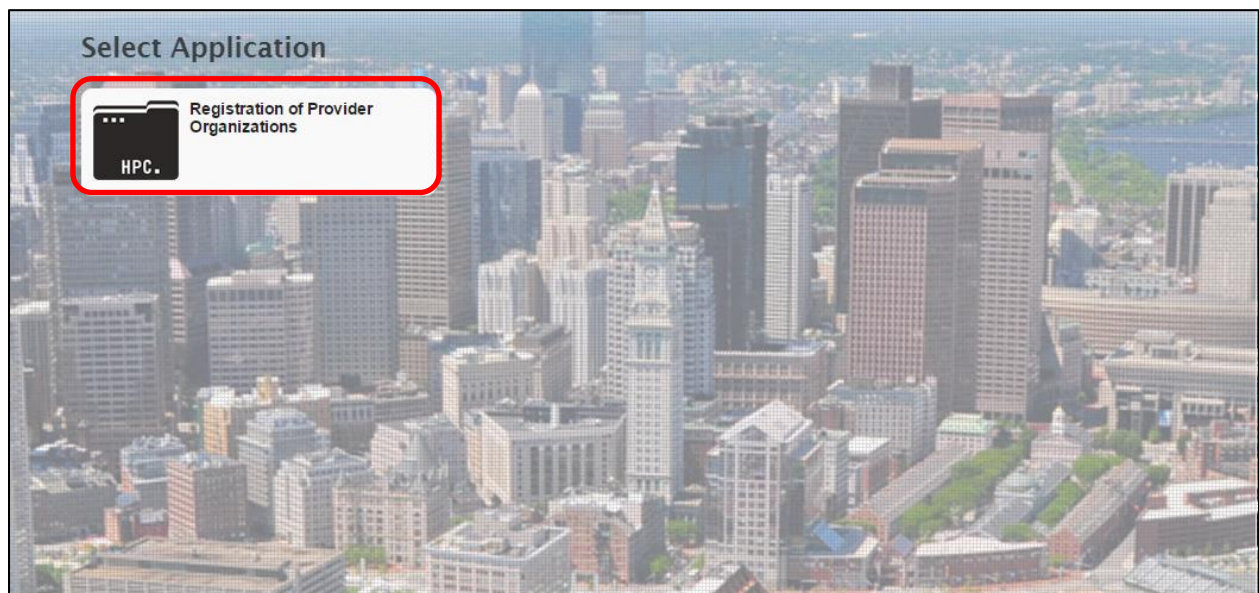
To access the online submission platform, click on the URL in the e-mail notification or enter <https://chiasubmissions.chia.state.ma.us/> in your browser.



Enter your user name and password on the log-in page, shown above. For the security of your account, please change your temporary password once you have logged in to the system. If you forget your user name or password, please contact HPC-RPO@state.ma.us to have your password reset. You will not be able to request a password reset from within the system.

Once you have logged into the system, you will be prompted to select the application that you would like to access. Some individuals may only have access to the Registration of Provider Organizations application, while others who have other reporting obligations to CHIA may have access to other applications.

Select the Registration of Provider Organizations icon to access the Registration of Provider Organizations online submission platform.



Home Page Tab

After opening the RPO application, you will be directed to the Home Page. From this page you can see program updates and the status of your application. You can also access important program documents, including the full Data Submission Manual (DSM) and Microsoft Excel templates, in the Resources section.

The screenshot shows the Home Page of the RPO Online Submission Platform. The header includes the Health Policy Commission logo and the title "Registration of Provider Organizations (RPO) Online Submission Platform". Below the header, there are two tabs: "Home" (selected) and "Application". The main content area is divided into three sections: "Program Updates", a central welcome message, and "Resources".

Program Updates

August 25, 2015
An instructional video on how to navigate the site is available on the HPC's website.

Welcome to the Registration of Provider Organizations (RPO) Program Online Submission Platform. Provider Organizations will use this site to view and submit Initial Registration: Part 2 materials to the Health Policy Commission.

To access your application, please select the Application tab on the left-hand side above. You can view your application status below. A User Manual is available in the Resources section to the right.

Status	Date Submitted	Days until Due
HPC In Progress		66 day(s)

Resources

- Data Submission Manual
- User's Manual
- Frequently Asked Questions (FAQs)
- Corporate Affiliations File Template
- Contracting Affiliations File Template
- Facilities File Template
- Clinical Affiliations File Template
- Physician Roster File Template
- RPO Affidavit of Truthfulness Template

The status of your application will either be **RPO In Progress**, **Under Review**, or **Approved**. The status of your application will be **RPO In Progress** until you have finalized your materials and submitted them to the HPC for review. Your application will then be considered **Under Review** until the HPC either requests updates to your materials (returning your application to **RPO In Progress** status) or determines that your materials are complete and updates your application status to **Approved**.

The Home Page will also display either the number of days until your application is due to the HPC, or, if you have already submitted your materials, the date of your most recent submission.

Status	Date Submitted	Days until Due
RPO In Progress		70 day(s)

Status	Date Submitted	Days until Due
Under Review	10/16/2015	

To view your application materials, click the Application tab on the top of the page. If at any point you want to return to the Home page, click the Home tab.

Home

Application

Program Updates

August 25, 2015
An instructional video on how to navigate the site is available on the HPC's [website](#).

Application Tab and General Instructions

A. Application Tab General Layout

The Application tab has seven subtabs that correspond to the files in the DSM: Background Information, Corporate Affiliations, Contracting Affiliations, Contracting Entity, Facilities, Clinical Affiliations, and File Attachments. The online submission platform does not have a subtab for the Physician Roster, as this file cannot be edited from within the online submission platform and must be submitted as a File Attachment. To navigate through the system, click on the subtab that you want to view. If you are reporting on behalf of more than one Provider Organization, you will be able to select the Provider Organization whose application you want to access.

Background	Corporate Affiliations	Contracting Affiliations	Contracting Entity	Facilities	Clinical Affiliations	File Attachments
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B. Saving

You can save your progress in the online submission platform at any time. Click “Save” on the top right hand side of the page to save your progress. In order to save a new entity (e.g., a corporate affiliate, a contracting affiliate, etc.) you must enter at least a name and Employer Identification Number. You can log-out and return to your application as often as necessary.

Detail: Example Health System (HPC In Progress)

Background Corporate Affiliations **Contracting Affiliations** Contracting Entity Facilities Clinical Affiliations File Attachments

+ - ↺

Contracting Affiliation Detail Clear all Data Import Template **Save**

✓	Name	EIN
✓	Medical Group 1	88-8888888
✓	Medical Group 2	44-4444444
✓	Medical Group 3	55-5555555

RPO-59 Legal Name of Contracting Affiliate
Enter the legal name of the contracting affiliate. *

Medical Group 2

RPO-60 Contracting Affiliate D/B/A or Alternate Name(s)
Enter all commonly used names by which the contracting affiliate is known, including any Doing-Business-As names for which the

MG2

C. Split-Screen Design

Except for the Background Information file, each of the subtabs has a split-screen design. The left hand side of the page displays a list of the entities (e.g., corporate affiliates, Facilities, clinical affiliates, etc.) while the right hand side displays the detailed information about the selected entity.

Detail: Example Health System (HPC In Progress)

Background Corporate Affiliations **Contracting Affiliations** Contracting Entity Facilities Clinical Affiliations File Attachments

Contracting Affiliation Detail

Clear all Data Import Template Save

Name	EIN
Medical Group 1	88-8888888
Medical Group 2	44-4444444
Medical Group 3	55-5555555

RPO-59 Legal Name of Contracting Affiliate
Enter the legal name of the contracting affiliate. *

Medical Group 2

RPO-60 Contracting Affiliate D/B/A or Alternate Name(s)
Enter all commonly used names by which the contracting affiliate is known, including any Doing-Business-As names for which the contracting affiliate has filed a D/B/A certificate as required by M.G.L. c. 110, § 5 or the applicable laws of another state.

MG2

RPO-61 Contracting Affiliate Employer Identification Number (EIN)
Enter the 9-digit Employer Identification Number (EIN) for the contracting affiliate. *

44-4444444 N/A

The list of entities on the left hand side of the screen can be collapsed using the arrow at the top of the list.

+ Add - Delete + Delete All

Acute Hospital 11-1111111

Employed Physician Group 22-2222222

Real Estate Entity 33-3333333

Physician Hospital Organization 88-8888888

If you have more than 20 entities, you can scroll through the list using the page numbers at the bottom of the list.

Records:67 Page: 1 of 3

1 2 3

To edit the information about a specific entity, select the entity from the list on the left hand side of the page. The entity's detailed information will be displayed on the right hand side of the page.

Detail: Example Health System (HPC In Progress)

Background
Corporate Affiliations
Contracting Affiliations
Contracting Entity
Facilities
Clinical Affiliations
File Attachments

+
-
↺

Name
EIN

Medical Group 1
88-8888888

Medical Group 2
44-4444444

Medical Group 3
55-5555555

RPO-59 Legal Name of Contracting Affiliate
Enter the legal name of the contracting affiliate.

RPO-60 Contracting Affiliate D/B/A or Alternate Name(s)
Enter all commonly used names by which the contracting affiliate is known, including any Doing-Business-As names for which the contracting affiliate has filed a D/B/A certificate as required by M.G.L. c. 110, § 5 or the

Clear all Data
Import Template
Save

Medical Group 2

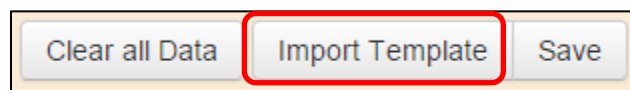
MG2

11

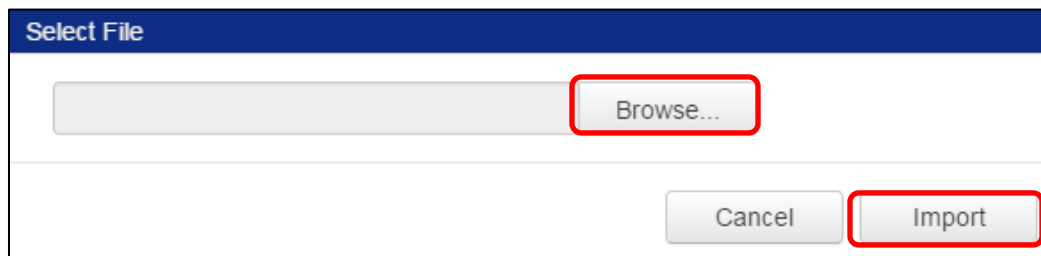
D. Importing Microsoft Excel Templates

The HPC has issued customized Microsoft Excel templates via email to each Provider Organization which include information submitted in Part 1 of Initial Registration. Blank Microsoft Excel templates are also available on the Home Page under Resources. These templates can be used to complete a portion of the data elements in the Corporate Affiliations file and all of the data elements in the Contracting Affiliations file, Facilities file, and the Clinical Affiliations file. Completing and uploading these templates to the online submission platform will likely save you time.

To import a completed Microsoft Excel template, navigate to the applicable subtab in the Application tab. Click “Import Template” on the right hand side of the page.



Browse to the file location on your computer and select the completed template. Then select “Import.”



You will see a status bar indicating that your upload has been successful.



When you import the template, all of the existing data will be overwritten by the information in your Microsoft Excel template. If you have an affiliate listed in the online submission platform that is not listed in your Microsoft Excel template, the system will delete the affiliate. For this reason, the HPC recommends that you finalize and import your templates before you make any manual edits in the system. If you need to update information in a Microsoft Excel template, you can import a new template at any time, but the information you import will overwrite all existing

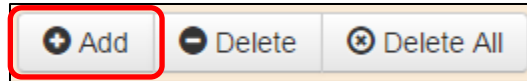
data in the system. If you get an error message when importing a template, make sure that you have not altered the formatting of the template (e.g., adding or deleting rows) and that you have followed the instructions in the DSM and the templates on how to enter the information properly.

Please note that to add a new entity using the Microsoft Excel template, you should add the entity as a new row in the template. If you delete other affiliates from the file (i.e., if you upload an Excel template that only lists the new affiliate), the online submission platform will delete the other affiliates from the system. Please be aware that if you add, edit or delete an entity manually in the online submission platform, your Microsoft Excel template may be out of date. If you choose to reimport the template, please make sure that any changes that you made manually in the online submission platform also have been made to your Microsoft Excel template; otherwise, reimporting the template will overwrite your manual edits.

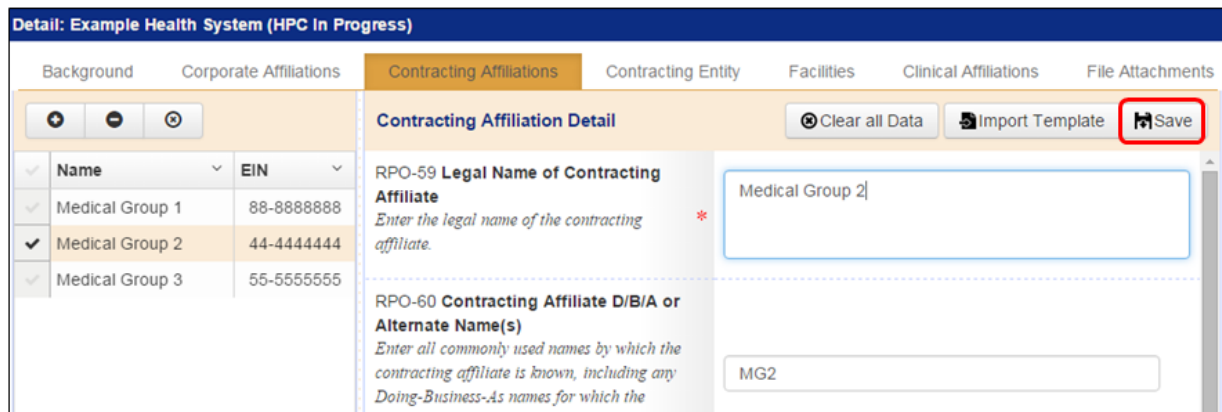
If you experience difficulties importing a template, contact the HPC for assistance at HPC-RPO@state.ma.us.

E. Manual Entry

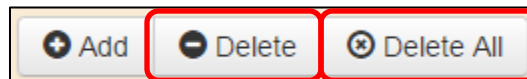
To manually add a new entity (i.e., rather than by importing the applicable Microsoft Excel file), click “Add” on the left hand side of the page.



A blank set of questions will appear on the right hand side of the page. Respond to the applicable questions and then click “Save” on the top right hand side of the page.

A screenshot of a web application window titled 'Detail: Example Health System (HPC in Progress)'. The 'Contracting Affiliations' tab is selected. On the left, there is a table with columns 'Name' and 'EIN'. The table contains three rows: 'Medical Group 1' with EIN '88-8888888', 'Medical Group 2' with EIN '44-4444444', and 'Medical Group 3' with EIN '55-5555555'. The 'Medical Group 2' row is highlighted. On the right, there is a form titled 'Contracting Affiliation Detail' with fields for 'Legal Name of Contracting Affiliate' (containing 'Medical Group 2') and 'Contracting Affiliate D/B/A or Alternate Name(s)' (containing 'MG2'). At the top right of the form area, there are buttons for 'Clear all Data', 'Import Template', and 'Save'. The 'Save' button is highlighted with a red rectangular box.

To delete an entity, select the entity you want to delete on the left hand side of the screen and click “Delete.” To delete all entities, select “Delete All.” The system will ask if you are sure you want to clear all of the data on this page. If you select “OK,” all of the entities will be deleted and you will not be able to recover these entities.



F. Required Questions

A red star next to a data element indicates that the question must be answered.

RPO-01 Legal Name of Registering Provider Organization *
Enter the legal name of the Registering Provider Organization.

You may click “Save” at any time as long as you have entered an Entity’s name and EIN. The online submission platform can help you track your progress in completing the required fields. Once you have completed all of the required fields for an entity, the online submission platform will highlight the entity in green on the left hand side of the page. If you have not answered all of the required questions for an entity, the online submission platform will display the affiliate without green shading.

Background Corporate Affiliations Contracting Affiliations		
+ Add - Delete * Delete All		
✓	Name	EIN
✓	Example Medical Center	11-1111111
✓	Example Physician Group	33-3333334
✓	Example Physician Hospital Organization	22-2222222
✓	Corporate Parent	88-8888888
✓	Medical Group	98-7654321

G. Question Logic

The online submission platform uses question logic to indicate whether or not certain questions have to be completed. For example, if a Provider Organization states that it does not contract for affiliated Providers (Data element RPO-66 in the Contracting Entity file), the Provider Organization will not have to answer data element RPO-67: Services Offered to Contracting Affiliates. If you select “No” in response to RPO-66 to indicate that your Provider Organization does not contract for affiliated Providers, the online submission platform will automatically shade RPO-67 in grey and change the cursor to a red no sign to make clear that you are not required to answer this question.

RPO-66 Contracting for Affiliated Providers
Does the Contracting Entity establish contracts on behalf of any Health Care Professionals that it, or a corporate affiliate of the Registering Provider Organization named in RPO-01, does not employ, or on behalf of a Provider with which the Contracting Entity does not have a Corporate Affiliation? *

☐ Yes ☒ No

RPO-67 Services Offered to Contracting Affiliates
Select each service that the Contracting Entity offers to Health Care Professionals or Providers that are not employed or owned by the Registering Provider Organization named in RPO-01 or any of its corporate affiliates. (See [Note](#))

☒ Administrative Support: Billing
☐ Administrative Support: General
☐ Care Management
☐ Carrier Contract Management
☐ Information Technology
☐ Other Management
☐ Professional Training
☐ None of the above

The question logic will also indicate if you can bypass an entire file. In RPO-42, you can indicate, for example, whether you have any reportable Contracting Affiliations. If you indicate that you do not have any reportable Contracting Affiliations, the system will grey-out the Contracting Affiliations tab at the top of the page. You will not be able to click on this tab or answer any of the questions in this file. If your contracting relationships change and you now have to report Contracting Affiliations, you can access the Contracting Affiliations subtab by unchecking “My organization does not have any reportable Contracting Affiliations” in RPO-42: Applicable Files on the Background Information file subtab.

RPO-42 Applicable Files
Select the options that are true for your organization.

☒ My organization does not have any reportable Contracting Affiliations.
☐ My organization does not own or control any licensed Facilities, directly or indirectly.
☐ My organization has been approved by the HPC to submit an abbreviated application, and is therefore not required to submit a Physician Roster.
☐ My organization does not have any reportable Clinical Affiliations.

Background Corporate Affiliations **Contracting Affiliations** Contracting Entity Facilities Clinical Affiliations File Attachments

H. Recommended Order of Completing Files

The HPC strongly recommends completing the Corporate Affiliations file before entering information about your other relationships. The online submission platform will use the information from your Corporate Affiliations file to populate other questions on other tabs. For instance, if you select “Yes” in response to question RPO-48 for a corporate affiliate, that affiliate will be listed as an answer option in questions RPO-49 and RPO-63, and as a Corporately Affiliated Contracting Entity in the Contracting Entity file.

I. Submitting Final Materials

When you have completed all of the required application materials and are ready to submit your materials to the HPC, select “Submit” on the top right hand side of the page.

The screenshot shows a web application interface. At the top, there are two tabs: 'Home' and 'Application', with 'Application' being the active tab. In the top right corner, there is a red button labeled 'Submit'. Below the tabs, the page title is 'Detail: Example Health System (HPC In Progress)'. Underneath this, there are several sub-tabs: 'Background', 'Corporate Affiliations', 'Contracting Affiliations', 'Contracting Entity', 'Facilities', and 'Clinical'. The 'Background' tab is currently selected. Below the sub-tabs, there are two buttons: 'Clear all Data' and 'Save as Draft'. The main content area shows a form for 'RPO-01 Legal Name of Registering Provider Organization'. The text 'Enter the legal name of the Registering Provider Organization.' is displayed, followed by a red asterisk. The input field contains the text 'Example Health System'.

If you click “Submit” without answering each of the required questions, you will receive a pop-up alert identifying the tab(s) with missing information. You must complete these fields before submitting your final materials.

The screenshot shows a pop-up window titled 'Alert Message'. It contains a warning icon (a triangle with an exclamation mark) and the following text: 'There are required fields in the Background Information file that have not been completed.' Below this, there are four lines of text: 'One or more corporate affiliates is missing required information.', 'One or more contracting affiliates is missing required information.', 'One or more Facilities is missing required information.', and 'One or more required attachments is missing.' At the bottom right of the window, there is an 'OK' button.

Once you click “Submit” you will not be able to edit your files. If you need to edit your files after you have submitted them, please contact program staff at HPC-RPO@state.ma.us.

Application Subtabs and File-Specific Instructions

This section of the User Manual contains specific instructions on how to complete the Corporate Affiliations file, the Physician Roster file and the File Attachments. These files have unique features that differ from the general instructions.

A. Corporate Affiliations File Subtab

As noted above, the HPC strongly recommends completing the Corporate Affiliations file before entering information about your other relationships. The online submission platform will use the information from your Corporate Affiliations file to populate other questions on other tabs.

Each Provider Organization received a customized Microsoft Excel template that includes the information submitted about each of your corporate affiliates in Part 1. The HPC also strongly recommends using this Microsoft Excel template to complete questions RPO-43 through RPO-48 of the Corporate Affiliations file, as importing the template for these questions will allow the online submission platform to accurately populate answer choices for other questions in this file.

After you have completed the Corporate Affiliations file Microsoft Excel template, import the information into the online submission platform according to the instructions in the Application Tab section of this document. Please note that importing a template will overwrite existing data in the Corporate Affiliations file; thus, we recommend completing the Microsoft Excel template before making manual edits.

Once you have imported the template, the data that you entered in the Microsoft Excel template will appear in the Corporate Affiliations subtab. You can then complete the additional questions that were not included in the Microsoft Excel template (RPO-49 through RPO-58) for each corporate affiliate. You can also edit the information you have imported from within the online submission platform if necessary.

If you need to add or delete a corporate affiliate from your list, you may either add or delete the affiliate using the process to import a new Microsoft Excel template or the manual entry process outlined in the Application Tab section of this document. Please note that to add a new affiliate using the Microsoft Excel template, you should add that affiliate as a new row in the template. If you delete other affiliates from the file (i.e., if you upload an Excel template that only lists the new affiliate), the online submission platform will delete the other affiliates from the system.

Please be aware that if you add, edit or delete an affiliate manually in the online submission platform, your Microsoft Excel template may be out of date. If you choose to reimport the template, please make sure that any changes that you made manually in the online submission platform also have been made to your Microsoft Excel template; otherwise, reimporting the template will overwrite your manual edits.

B. Physician Roster File

Unless you have been approved to submit an abbreviated application, you must complete the Physician Roster file by completing the HPC-issued Microsoft Excel template and uploading the template as a file attachment in the online submission platform. There is no subtab for the Physician Roster file. For instructions on how to upload a file attachment, please refer to the File Attachments section in this document below.

The data in the Physician Roster file is not editable from within the online submission platform. If you need to make an edit to the Physician Roster file information, you must make the edit within the Microsoft Excel template and upload a revised version to the online submission platform.

If you are required to upload multiple physician rosters that correspond to distinct Corporately Affiliated Contracting Entities, please use the following file name format for each roster: "Physician Roster_Part 2_[Name of Corporately Affiliated Contracting Entity]."

C. File Attachments Subtab

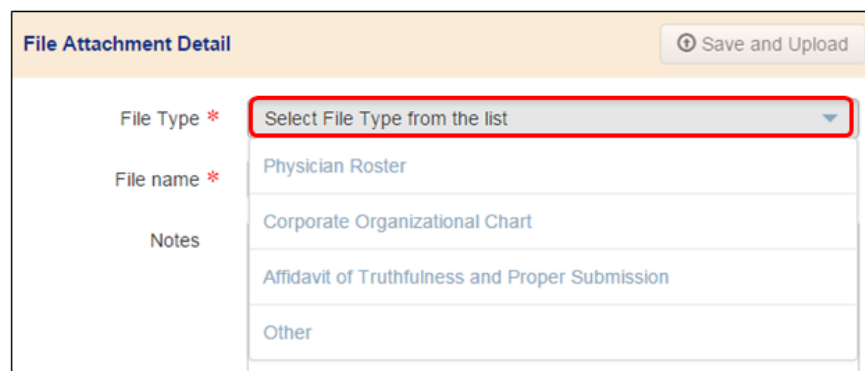
You will use the File Attachments subtab to upload your corporate organizational chart, Affidavit of Truthfulness and Proper Submission, and Physician Roster(s), if applicable.

Your corporate organizational chart that was submitted in Initial Registration: Part 1 will be preloaded in the online submission platform. If it is still accurate, you do not need to upload a new file. If your organizational chart has changed, please upload a new version of the corporate organizational chart, and indicate that the chart has been revised in the Notes section of the File Attachment page.

You must upload a new Affidavit of Truthfulness and Proper Submission. You cannot use the same affidavit that was submitted in Initial Registration: Part 1.

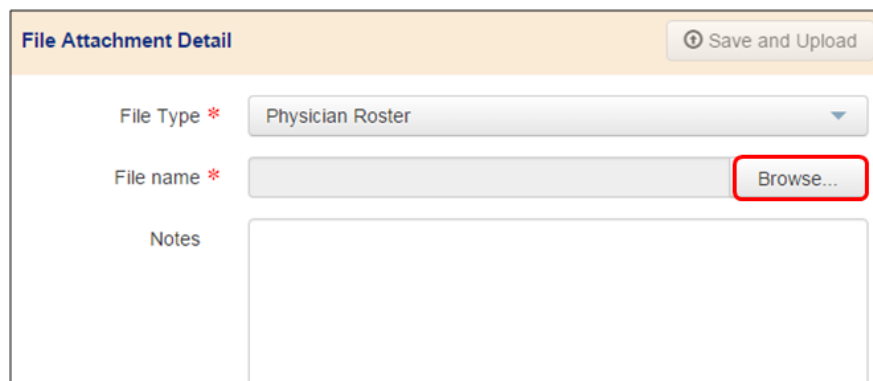
If you would like to add any notes or explanatory information to your submission, you may upload those separate documents here and select file type “Other.” **Please note that any information so submitted will be a public record and will be part of your RPO registration.**

To add a file, select the file type from the drop-down menu on the right-hand side.



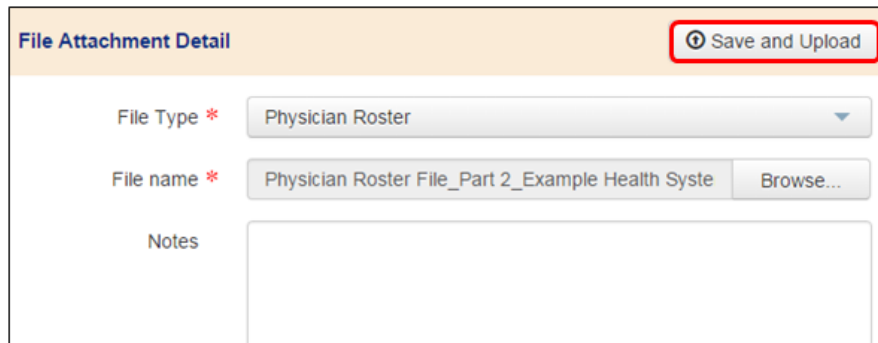
The screenshot shows the 'File Attachment Detail' form. At the top right is a 'Save and Upload' button. The 'File Type' field is a dropdown menu with a red box around it, displaying 'Select File Type from the list'. Below it, the 'File name' field is labeled 'Physician Roster'. The 'Notes' field contains a list of options: 'Corporate Organizational Chart', 'Affidavit of Truthfulness and Proper Submission', and 'Other'.

Next, click “Browse.”



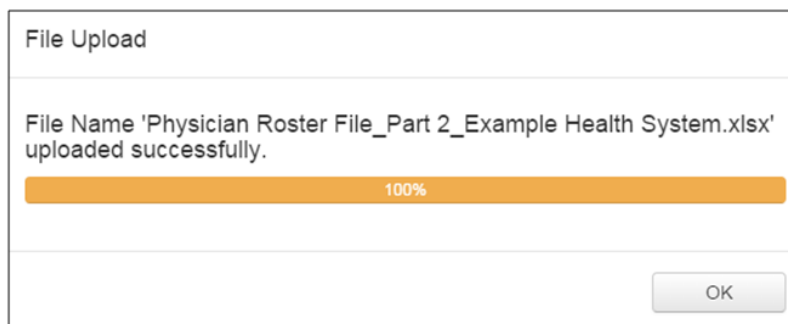
The screenshot shows the 'File Attachment Detail' form. At the top right is a 'Save and Upload' button. The 'File Type' field is a dropdown menu with 'Physician Roster' selected. The 'File name' field is empty, and the 'Browse...' button is highlighted with a red box. The 'Notes' field is empty.

If you would like to add a brief note to your file, type the text into the Notes field. Then click “Save and Upload.”



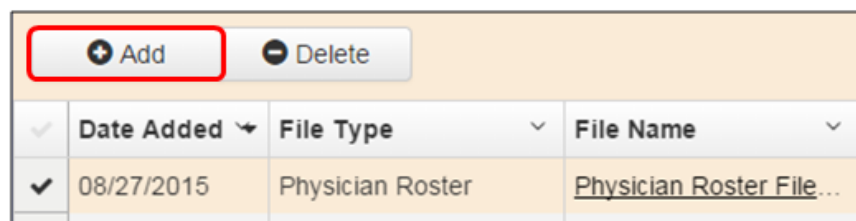
The 'File Attachment Detail' form has a title bar with a 'Save and Upload' button highlighted by a red rectangle. Below the title bar, there are three fields: 'File Type *' with a dropdown menu set to 'Physician Roster', 'File name *' with a text input containing 'Physician Roster File_Part 2_Example Health Syste' and a 'Browse...' button, and a 'Notes' text area.

You will see a status bar indicating that your upload has been successful.



The 'File Upload' status bar shows the message 'File Name 'Physician Roster File_Part 2_Example Health System.xlsx' uploaded successfully.' Below the message is a progress bar that is 100% full. An 'OK' button is located at the bottom right of the status bar.

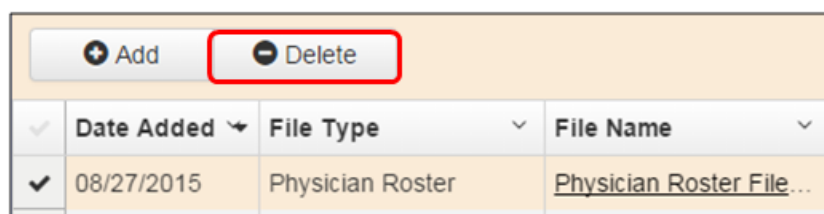
To add another file, click “Add” in the upper left hand corner.



The file list interface features a table with columns for 'Date Added', 'File Type', and 'File Name'. Above the table are 'Add' and 'Delete' buttons, with the 'Add' button highlighted by a red rectangle. The table contains one row for a file named 'Physician Roster File...' added on '08/27/2015'.

	Date Added	File Type	File Name
✓	08/27/2015	Physician Roster	<u>Physician Roster File...</u>

To delete a file, click on the file you would like to delete on the left hand side of the page and press “Delete.”



This view of the file list interface is identical to the previous one, but the 'Delete' button is highlighted by a red rectangle.

	Date Added	File Type	File Name
✓	08/27/2015	Physician Roster	<u>Physician Roster File...</u>

Contact Information

If you have any questions about the online submission platform, please e-mail us at HPC-RPO@state.ma.us.